Croner

a Wolters Kluwer business

Croner eLearning Management System User Guide

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1. About this User Guide

This User Guide has been developed to help you use the Management System for the Croner line of eLearning products. Those products include learning modules that provide training in:

- Health and Safety
- Equality and Diversity Compliance
- Display Screen Equipment Self Assessment.

These are for either an office or an industrial environment.

Croner eLearning tools provide an easy-to-use platform for student users to carry out training, testing and self assessment. They also provide a simple yet powerful Management System which allows administrators to manage their organisation's electronic training and evaluation programme. Using this Management System, administrators can:

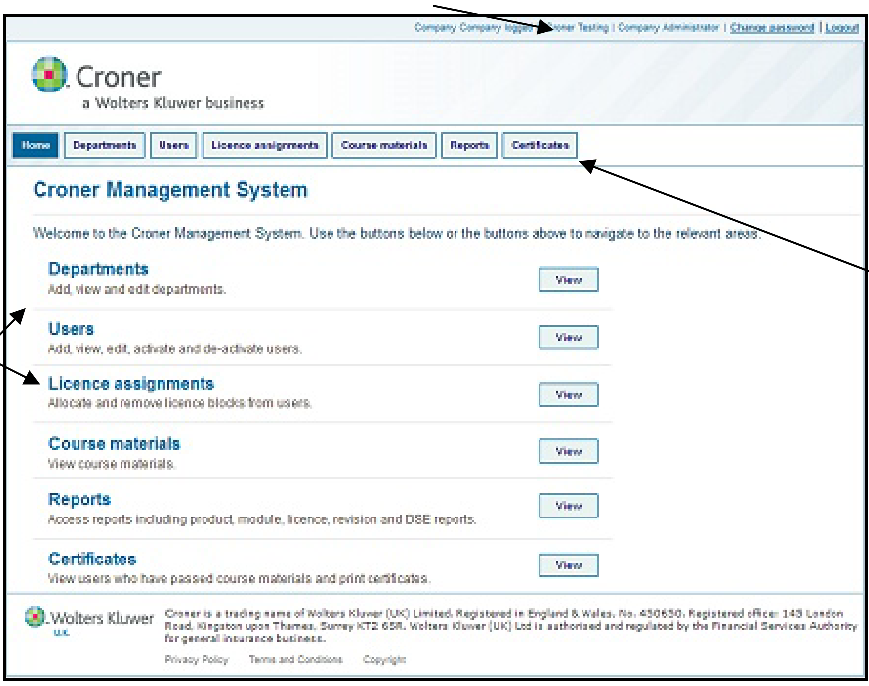
- assign training materials to students
- manage and monitor student progress
- deal with any issues identified in the training and assessment
- preserve an archive of training and assessment outcomes.

This User Guide provides you with a brief overview of the Management System, followed by a feature-by-feature discussion of the various administrator functions.

2. Overview of the Management System

The Croner eLearning Management System uses a simple interface to organise all the functions of a company administrator.

Login identity, company name,
Change Password and **Logout** links.



Administrator function links. Each function is described in brief.

Navigation menu buttons lead to various administrator functions.

As an administrator, the basic tasks you can accomplish with the Management System are:

- create departments or groups which will contain users
- add users (either students or administrators)
- monitor licences and allocate products to student users
- use reports to track and evaluate user training progress.

2.1 Types of user

The eLearning Management System User creation functionality allows you to create either **administrator** or **student** users. Administrators created by you carry all of the same privileges as the original administrator login created and assigned to you by Croner.

Student users may log in to the system and review the course materials that have been assigned to them by the company administrator(s). They may also change their own password. Student users have no direct Management System privileges.

2.2 Departments and user groups

The eLearning Management System organises student users through the creation of user groups that you define. One common strategy for creating user groups is to define them by department within your organisation. Administrators use functionality on the **Departments** screen to create these groups.

Once a department or a user group is set up and defined in the system, new student users are added to it as they are created by the administrator.

> **Important Note:** The Management System requires that departments or user groups be defined **before** you add student users. The Management System will reject any student that is added before a group or department has been defined.

For more on defining user groups, see **Creating Departments** below.

2.3 Assigning course materials to student users

As a subscriber to Croner eLearning, your organisation has purchased a number of licences to a training Course (or Courses). Each Course (eg “Office Health and Safety” or “Equality and Diversity Compliance”) is divided into a series of Modules (eg “Introduction” and “Managing Recruitment”). Each Module is itself divided into a series of Topics, which include interactive training, summary and quiz components. Each Module ends with a “Test Your Knowledge” session, which affords an opportunity for students and administrators to gauge student progress.

Administrators can use the Management System to assign Course materials (also referred to in the Management System as “Products”, to students in any of the following ways.

- When creating a new student user, the administrator allocates to that student a product for which the company has purchased a licence.
- After a student user has been created, the administrator may edit that student’s profile using the **Users** functions to allocate the product to him or her.
- Using the **Licence Assignments** screen, the administrator may add (or remove) a product from all members of a department or user group.

For more information about allocating products, see **Creating Users** and **Assigning and Monitoring Licences** below.

2.4 Viewing reports

The Management System offers several reporting options that allow administrators to monitor and evaluate student training and testing within the system. The table below describes the report types and the information they contain.

Report name	Information
Reports about products	Allows administrators to view start date, completion date and status of each product assigned to each student. A further detailed report on Modules gives each student’s status on each individual module of the products assigned to them.
Reports about modules	Displays the student’s start date, last access date, degree of completion and test results for each

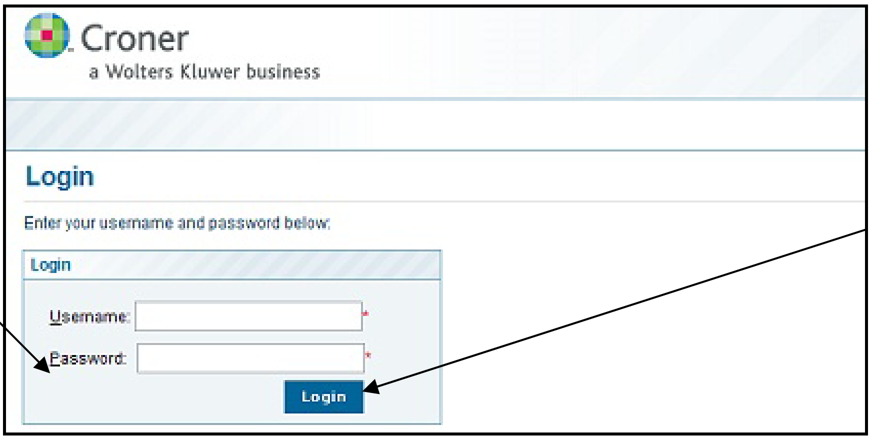
	module. Filters allow the report to be narrowed to show results for individual modules, departments or by test results.
Reports about licences	Presents detail about each block of licences purchased, including students assigned to each department and date on which the licence was used.
Revision report	Displays information about the results of testing at the end of each module. Users who have not answered every question correctly appear on this report, with the module they have failed listed for revision. The report can be filtered to show results for specific modules and users.
Display Screen Equipment (DSE) report	Reports the status of each user's DSE Self Assessment. Can be filtered by department or by user. Displays status of each user's self assessment, whether the test has been started, and whether the user's DSE has been found to be compliant.

For more information on using Reports, see the **Reports** section below.

3. Login

For your first login to the eLearning Management System, Croner supplies you with a URL and an initial Username and Password. Entering the URL in your browser brings you to the Login screen.

Enter your Croner-supplied Username and Password here.



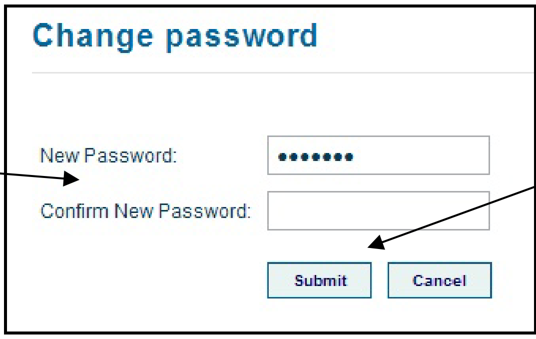
Click **Login** to enter the system.

You will then be prompted to re-set your password before entering the system for the first time.

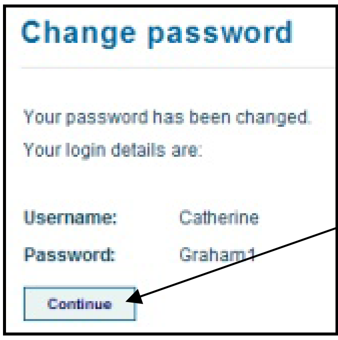
3.1 Re-setting your password

During your first login, the system requires you to edit your login information. The **Change password** screen prompts you to enter a new password.

Enter your new password in these fields. The new password is entered twice for confirmation.



Clicking **Submit** opens a message confirming your password change.

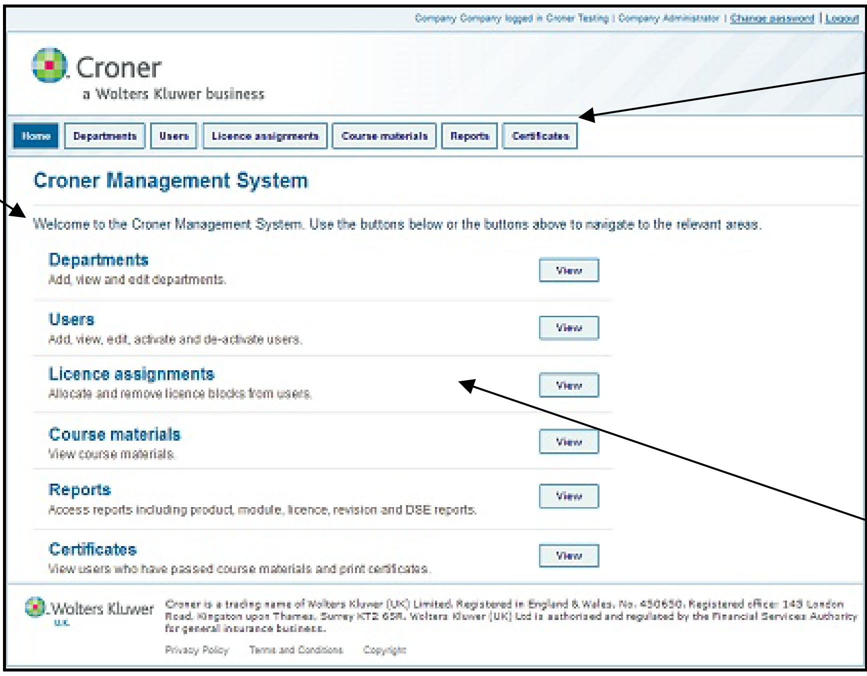


Click **Continue** to enter the system.

3.2 The welcome screen

The Welcome screen is your starting point for all Management System functions.

Welcome message greets you upon login.



Navigation menu buttons lead to administrator functions. These buttons are present throughout the Management System.

Welcome screen menu briefly describes each function.

4. Creating Departments and Groups

Before you create student users and allocate products to them, you ***must*** define the groups to which each student will belong.

> **Important note:** You will not be able to add student users until you create at least one department or group in which to place them.

4.1 About department and group definition

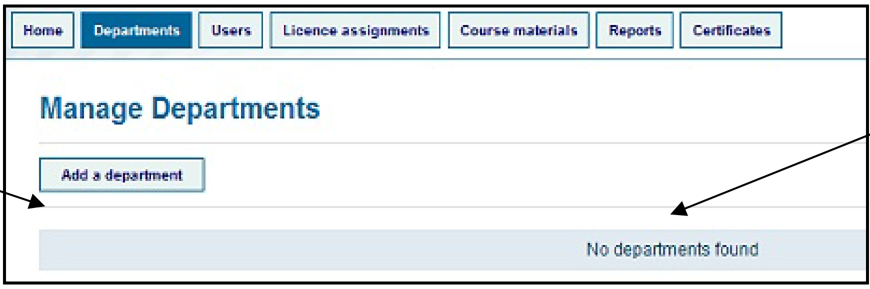
Croner eLearning Management System uses the term **Departments** to describe the groups you create for users because, frequently, the groups you create will be the department in which the student users work (Human Resources, Accounting, etc). But, as training administrator, you need not limit yourself to creating groups by department. If you subscribe to multiple eLearning products, you can define a group for each product and track users in that manner. Or, you may have multiple locations in your organisation and prefer to set up groups by location.

Regardless of whether you choose to define your groups by department or by some other criterion, be aware that this group definition will be an important factor in the way you track student progress. Many of the **Reports** screens allow you to filter and review users by department.

4.2 Adding a department or group

Beginning on any screen, click the **Departments** button to open the **Manage Departments** screen.

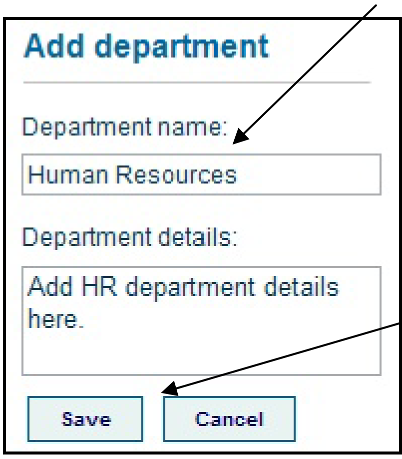
Click **Add a department** to open the **Add a department** popup.



No departments should appear the first time you open **Manage Departments**.

Enter group or department name.

Add location or any other ancillary information you feel will be useful in the **Department details** field.



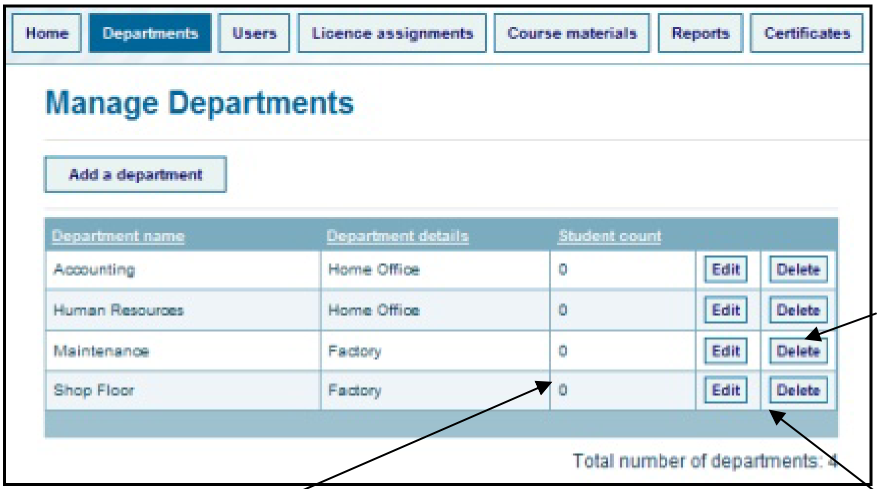
Click **Save** to add the new department.

Clicking **Save** loads the new department or group definition to the **Manage Departments** screen. Repeat the process above to add as many department or group definitions as suit your organisation's training programme.

4.3 Working with departments and groups

Once you have added departments or groups, the **Manage Departments** screen provides options for reviewing departments, editing their name and location or deleting them.

Groups and departments are listed alphabetically by name.



Clicking **Delete** permanently removes a department from the system.

Note: No students have been added at this stage. Students are assigned to departments when you create the student user in the system.

Clicking **Edit** opens the **Edit department** dialogue, allowing you to change **Name** and/or **Department details** fields.

5. Creating Users

As an administrator user of the Management System, you have the ability to add two types of user to the system: administrators and student users.

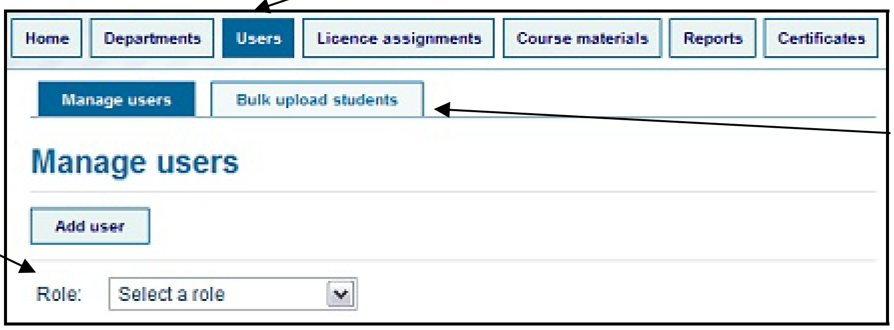
Administrators have full system privileges to create and edit users, manage departments and products, and work with reports.

Student users may log in to the system, access any training products that have been assigned to them and change their password.

Both types of user can be created and managed using the **Manage users** screen.

Click the **Users** button from any location in the product to access the **Manage users** screen.

Before you can view users on the **Manage users** screen, you must select the **Role** – administrator or student – that you would like to view.



The **Manage users** screen has an option for **Bulk upload** of student data. See the section below for more information about this option.

5.1 Creating a company administrator

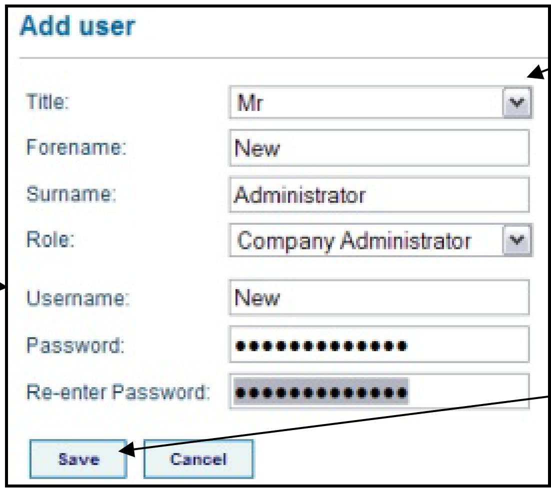
There may be times when you wish to create more administrators with full system privileges who can assign products and track students through reports.

1. On the navigation menu, click the **Users** button.

2. On the **Manage users** screen, click the **Add user** button.

3. Enter name information.

4. Select **Company Administrator** in the **Role** drop-down menu.



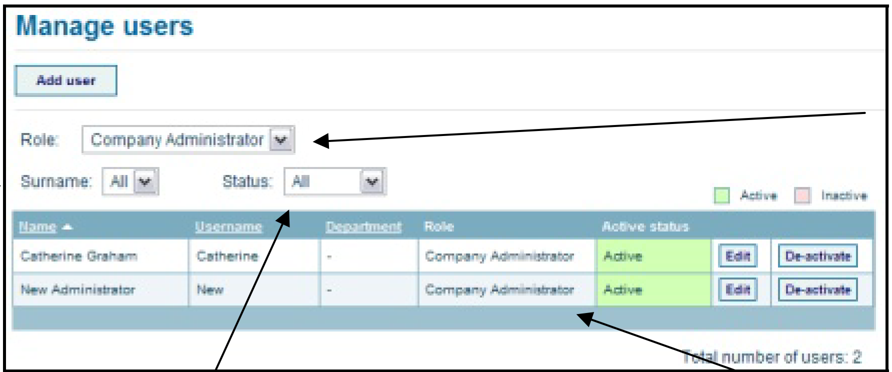
5. Enter an initial **Username** and **Password.** You will need to re-enter the password in order to confirm it.

6. Click **Save** to add the user.

When you **Save** a new user, the **Manage users** screen reappears.

Use the filter drop-downs if you wish to limit the number of users displayed.

Surname allows you to display only last names starting with a specific letter.



Selecting Company Administrator from the **Role** drop-down displays all administrator users.

The users list displays department, role and status information.

Status allows you select and display only active or inactive users.

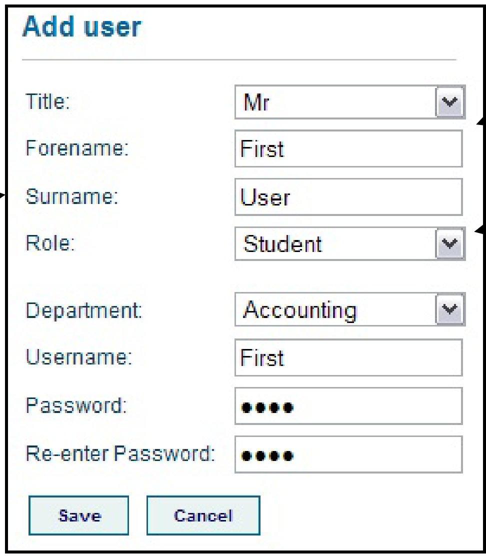
See the sections below for more information about **Editing** or **De-activating** users.

5.2 Creating student users

Before students can begin training, they must be added to the Management System, assigned to a department or group, and have a product or products allocated to them.

1. On the navigation menu, click the **Users** button.

2. On the **Manage users** screen, click the **Add user** button.



3. Enter name information.

4. Select **Student** in the **Role** drop-down menu.

5. Select a **Department** from the drop-down. This step is required for student users.

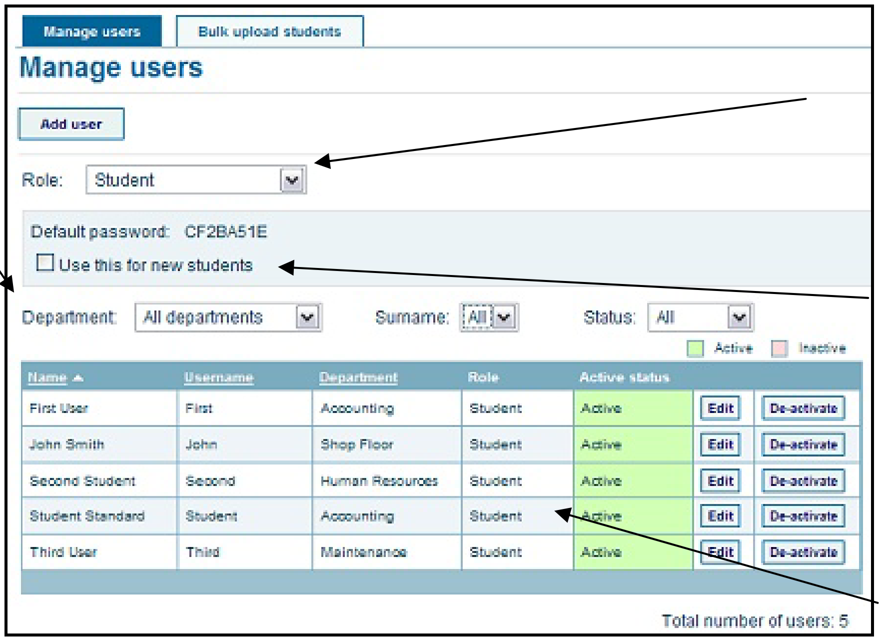
6. Enter an initial **Username** and **Password.** You will need to re-enter the password in order to confirm it.

7. Click **Save** to add the user.

Repeat the steps above to add as many students as necessary. For information on adding students in bulk, see the section below on **Bulk upload of student users.**

When you **Save** a new user, the **Manage users** screen reappears.

Use the filter drop-downs if you wish to limit the number of users displayed. **Surname** allows you to display only last names starting with a specific letter. **Status** allows you to select and display only active or inactive users. You can also filter by **Department**.



Selecting student from the **Role** drop-down displays all student users.

Select if you wish all new student users to be created with a standard default password.

The users list displays department, role and status information.

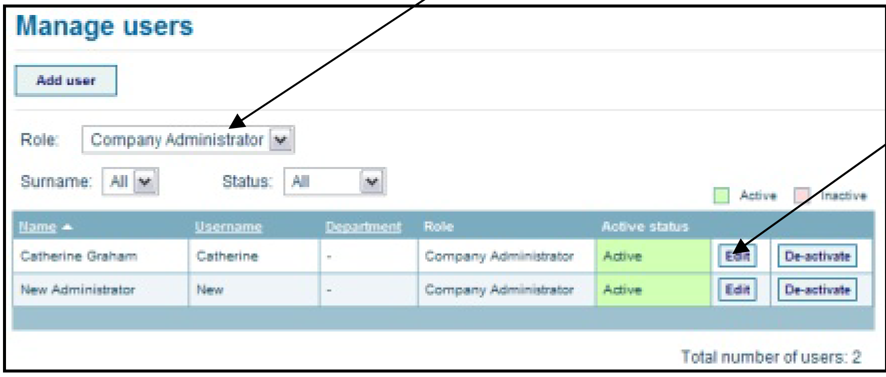
See the sections below for more information about **Editing** or **De-activating** users.

5.3 Viewing and editing user information

The **Manage users** screen allows you to view users by user role and department and to edit user information.

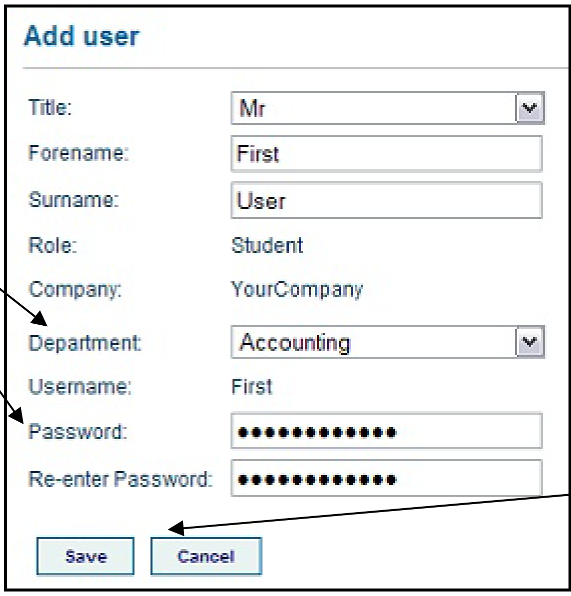
Click the **Users** button to open the **Manage users** screen.

Select from the **Role** drop-down menu to view administrator users or student users.



Click **Edit** to open the **Add user** dialogue.

The user's **Name**, **Department** and **Password** information may all be edited on this screen.



Click **Save** to save user changes to the Management System.

5.4 Active and inactive users

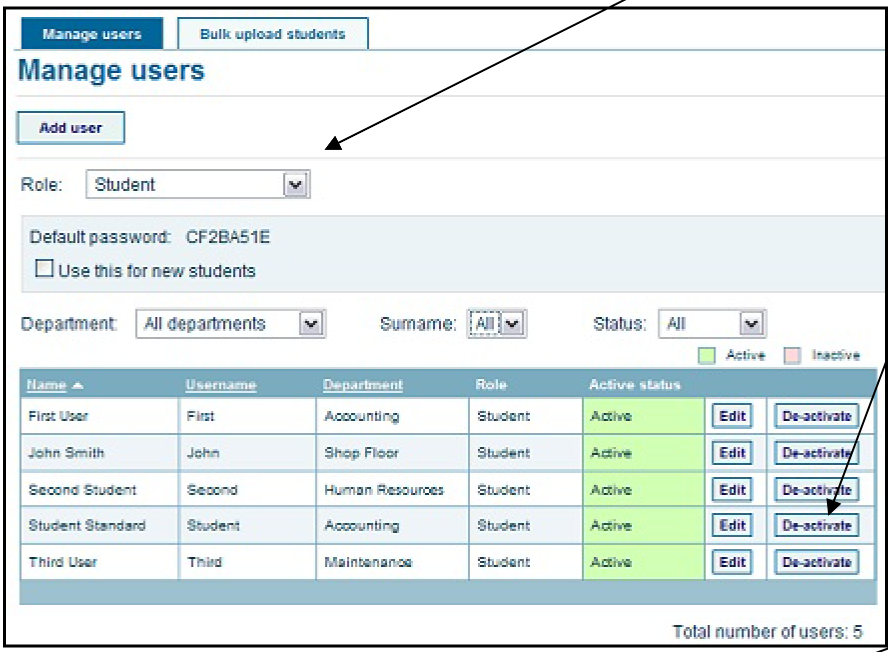
The Croner eLearning Management System allows you to deactivate students and administrators. Inactive users will retain their department assignment. They will also retain any licences that have been assigned to them.

The system stores inactive users, making it possible to reactivate them at a later date.

To deactivate a user:

Click the **Users** button to open the **Manage users** screen.

On the **Role** drop-down menu, select administrator or student to select the type of user you would like to view.



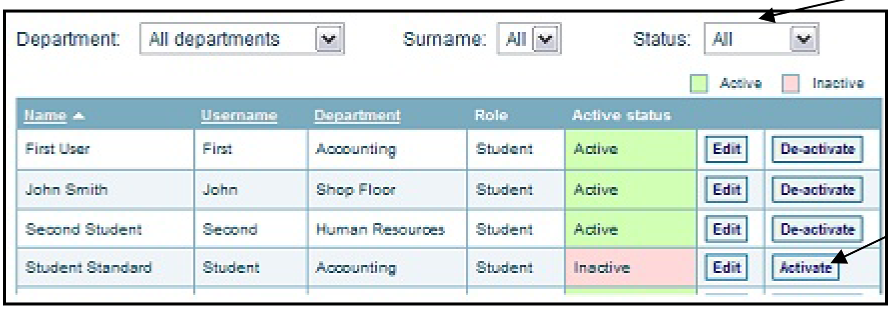
Click the **De-activate** button for the chosen user.

The user's **Status** changes to **Inactive.** The button changes to **Activate.**

To reactivate a user:

Click the **Users** button to open the **Manage users** screen.

You can select **Inactive** on the **Status** filter to view only inactive users.



Click **Activate.**

The user's status is returned to active.

Note: Reactivated users will be returned to the department or group in which they were previously placed. They will also retain any licences that had been assigned to them.

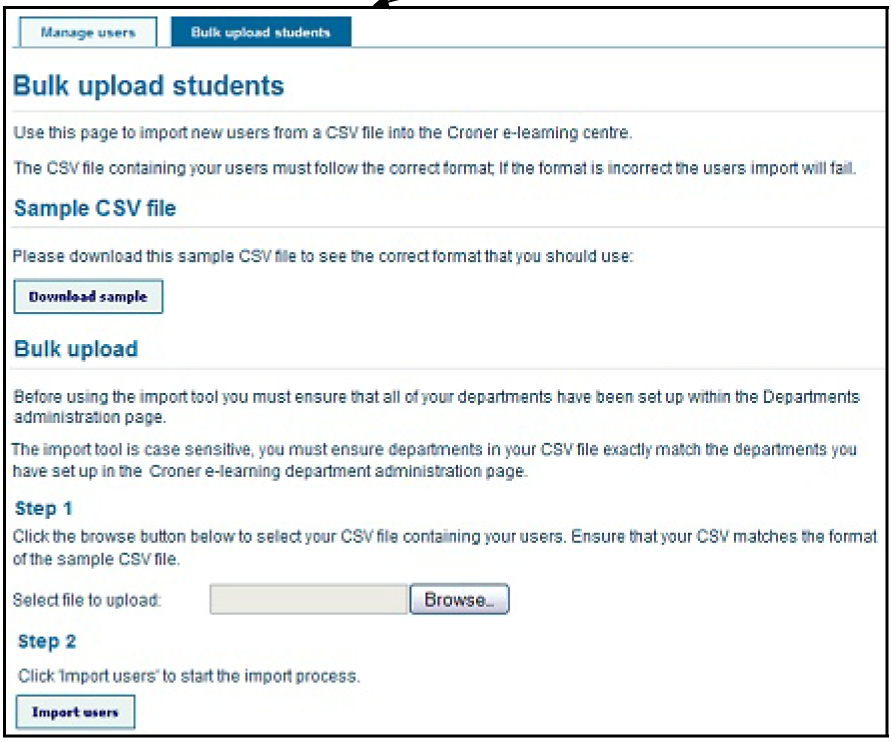
5.5 Bulk upload of students

The Croner eLearning Management System includes a feature allowing for the bulk addition of student users, making it possible to avoid manually adding large numbers of users.

> **Note:** This process is for the bulk upload of student users only. For administrators, please follow the directions for manual entry in the section above.

Click the **Users** button to open the **Manage users** screen.

Click **Bulk upload students** to view the bulk upload instructions.



The page contains complete instructions, fields and buttons allowing for upload of students in bulk.

Click **Download sample** to view a sample .csv file. Follow your browser's directions to download and view the file.

The .csv file contains pre-labelled columns for the entry of the student data. Replace the dummy content in each row with the data for the students you would like to upload.

	A	B	C	D	E	F
1	Title	FirstName	Surname	UserName	Password	Department
2	Mr	m	V	mv	mv	b dept
3	Ms	rf	rf	rf	rf	b dept
4						

Notes:

1. Be certain that your entries in the **Title** column correspond exactly to the options found in the **Title** drop-down of the **Add user** screen (Mr - Mrs - Miss - Ms - Reverend - Professor - Doctor). Notice that the abbreviations are not followed by a period.
2. Be certain that your entries in the **Department** column correspond exactly with the names of the departments that you have defined in the **Departments** screen.

Save the .csv file to your computer. Then use the **Browse** button on the upload field to locate the file. Clicking **Open** on the File Upload dialogue loads the file information to the upload field.

Click the **Import users** button. A message appears containing the status of the import. If any data was incorrectly entered in the spreadsheet, an alert appears at the bottom of the page telling you about the error. If this happens, correct the error and re-submit the import.

6. Assigning and Monitoring Licences

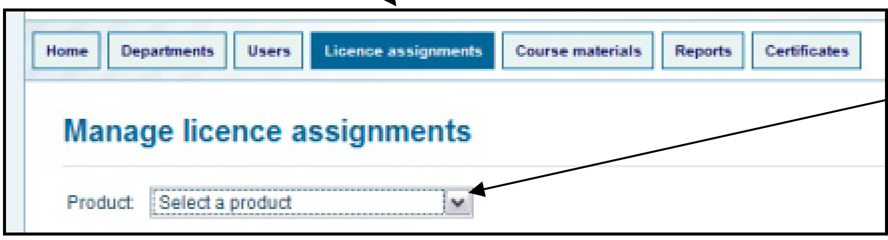
Use the **Licence assignments** screen functionality to track the status of licences for each product that your organisation has purchased and to assign licences for those products to your student users.

Each product to which you subscribe has its own products screen, which provides general information about your subscription, as well as giving an overview of product usage and allocation by department.

Finally, the **Licence assignments** screen offers convenient single-click ability to add or remove product allocations to all the users in a department.

6.1 Viewing licence and product allocation information

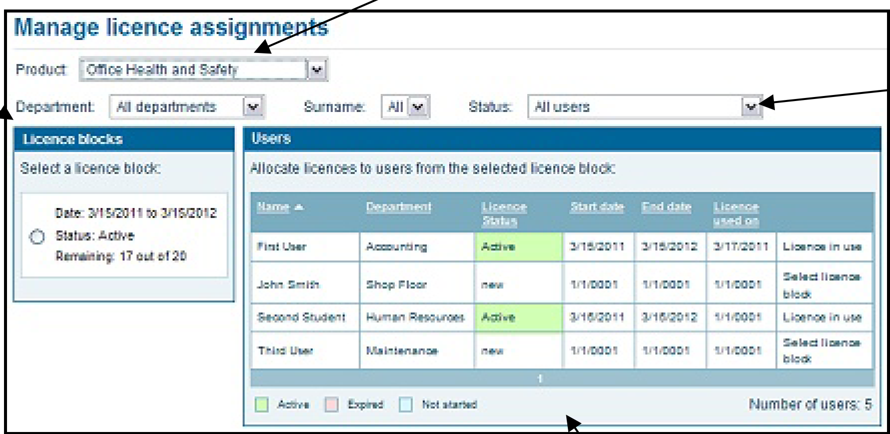
Click the **Licence assignments** button on the navigation menu to begin viewing licence information.



Select a product from this drop-down to open a view of its information in the space below.

Product selected from the drop-down menu.

The **Licence blocks** list displays each set of licences that your company has purchased for the selected product, as well as the number of licences allocated and used.



Use the **Department**, **Surname** and/or **Status** drop-down menus to limit the number of users appearing in the list.

The **Users** list displays licence information for each student in your organisation.

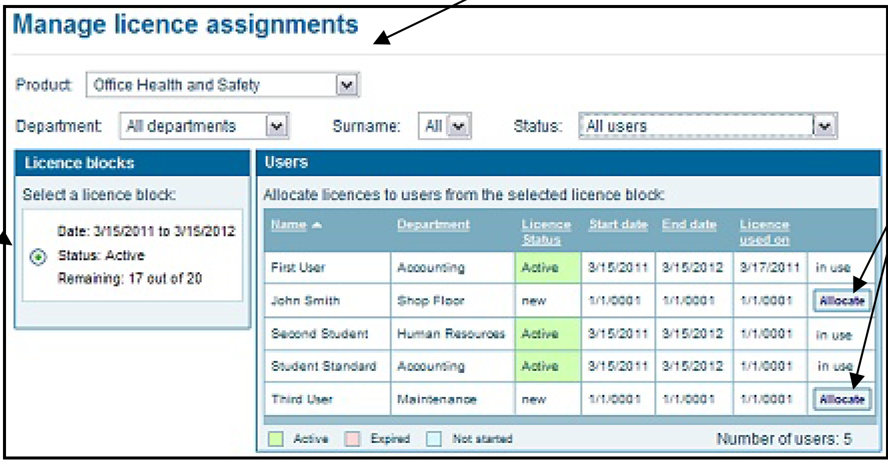
To view licence information for a different product, make another selection in the **Product** drop-down list.

6.2 Using the "Manage licence assignment" page to allocate products to users

Use the **Manage licence assignment** page to allocate licences for a specific product to specific users.

Select a product from this drop-down.

Licence blocks purchased by your organisation appear here. Click the button to select a block of licences.



With a block of licences selected, **Allocate** buttons appear for each user who does not have the current product allocated.

Click the **Allocate** button to assign a licence for the current product to the user.

To assign a different product to student users, select the new product from the **Product** drop-down menu and follow the directions above.

6.3 Removing a licence from a user

Important Note: Licences can be removed from users only if they have not yet logged in to the product and begun the course.

Allocated licences show a **Remove** button only if the user has not begun training.

Once training has begun, the users table displays **Licence in use.**

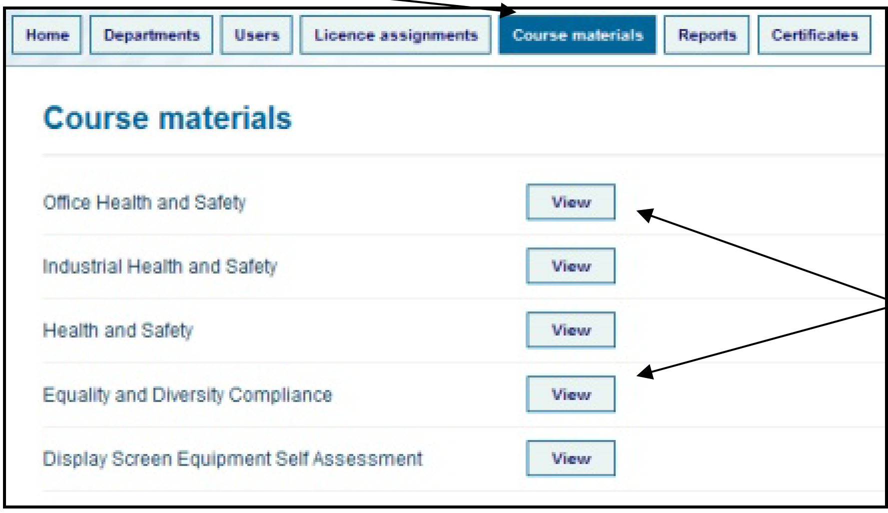
7. Viewing course materials

Administrator users may review any of the course products to which their organisation has subscribed.

> **Note:** Viewing course materials from an administrator login will not produce any reports, revision or test scores. Administrator course access is for review of the content only. To take a course, track progress and generate test results, an administrator will need to create a student user for himself or herself, assign a licence and log in as that student.

To review course materials from the administrator login:

Click the **Course materials** button on the navigation menu.



The **Course materials** page lists all the courses for which your organisation has purchased licences.

Click a **View** button to view a course.

The course appears in a new browser window. For more information about reviewing course materials, please see the Student User Guide for the course you would like to review.

8. Reports

Use the Managements System's **Reports** functionality to monitor, review and evaluate student progress toward the goals of your company's training programme. The **Reports** page includes a series of detailed reports about products, modules, licences, revisions needed and the status of students' DSE Self Assessment. Viewing reports in each of these categories allows you to review:

- summary overviews of student activity
- breakdown of students who have begun training
- listings of students who have not begun training
- assessment pass rate by individual students, or by department or module.

To begin viewing reports:

Click the **Reports** button on the navigation menu.

Each report type allows you to select the type of information to view in the report table.

The view defaults to **Reports about products.** Click another report tab to view the report on that category.

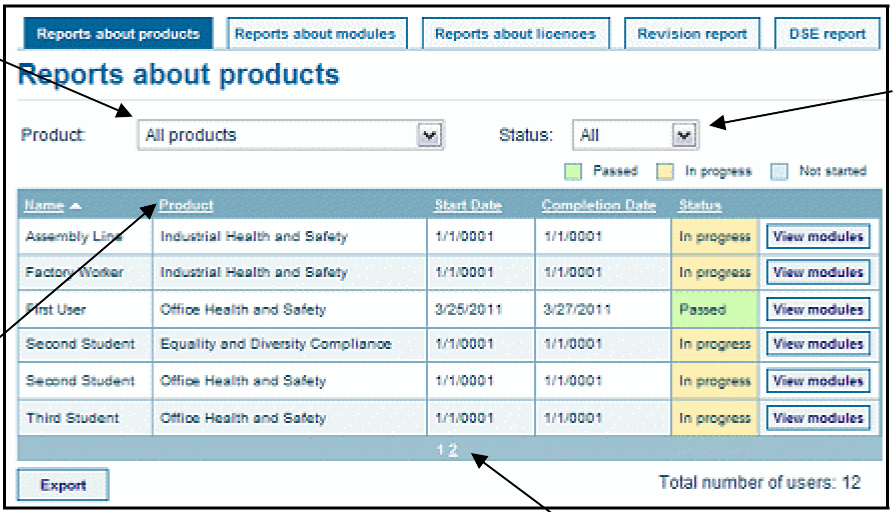
Colour coding indicates user training status as **In Progress**, **Passed** or **Not started.**

8.1 Reports about products

Reports about products is the default view when you select **Reports** on the main navigation menu. When you first view the report, it lists all students, all products and all levels of student progress. You can filter that view to present only specific products or specific student progress status.

The **Product** drop-down lets you select to view **All products** or any specific product that you have assigned to students.

Click column headers to sort the list by that column. Click again to reverse the sort.



Use the **Status** drop-down to view all students, only those who have **Passed**, only those **In Progress**, or only those who have **Not started**.

Longer reports are split into pages. Click a page number to view that page.

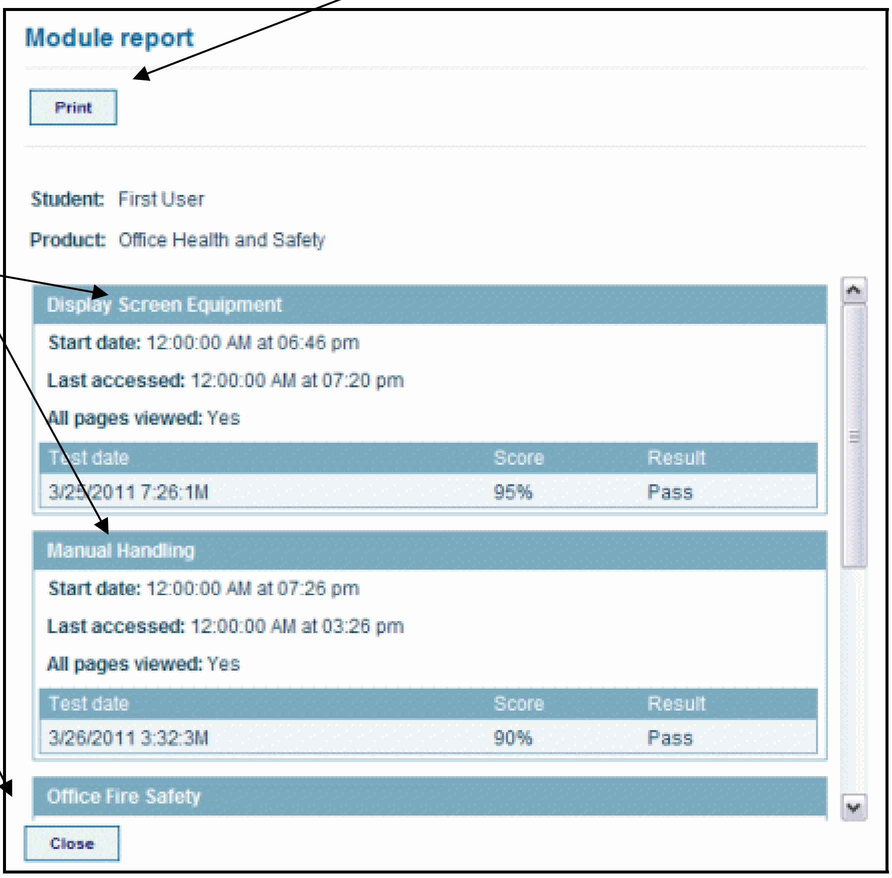
The **Reports about products** page allows you to view detailed information about an employee's progress and success with individual modules. To view module information, click the **View modules** button.

View modules Clicking **View modules** opens the **Module report** popup.

A single click of the **Print** button prints the module report.

A module report features start date, access information and test results for each module of the product.

Click to close the report window.



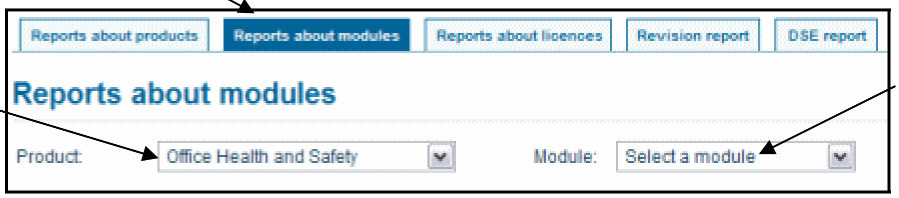
8.2 Reports about modules

The Croner eLearning Management System features another way to access information about students' progress through modules. Click the **Reports about modules** tab on the **Reports** menu to select a product and module to view.

The **View modules** popup, described above, reports on a single user's progress on all of the modules of a product. Use the **Reports about modules** tab to view information about module progress for all users to which the module has been assigned.

Click the **Reports about modules** tab to view module information.

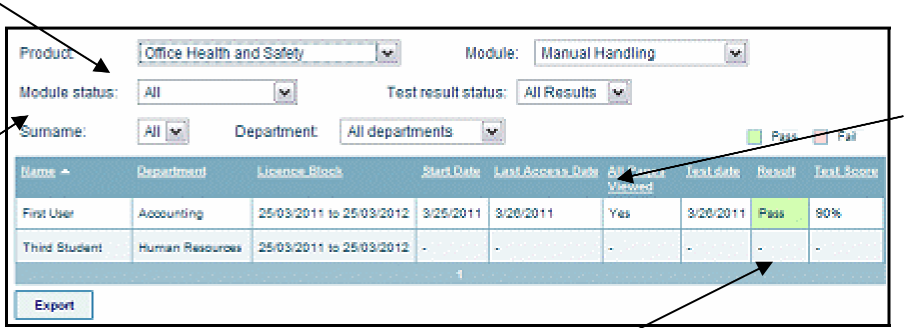
When you first access the report, no product is selected. Select a product to view.



When you select a product, the **Module** drop-down appears. Select a module to begin viewing module information.

With a **Product** and **Module** selected, several more drop-down filters and the specified user module information appear.

Use the drop-down filters to narrow or expand the scope of the information you would like to view.



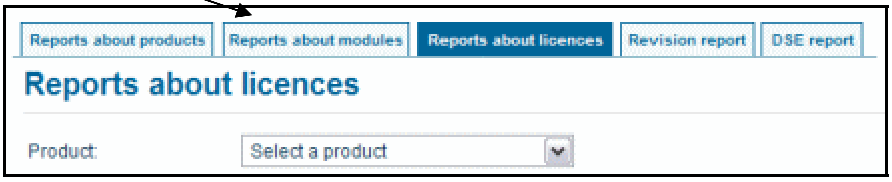
Information includes **Licence block**, **Start** and **Access** dates, **Test Dates** and test scores. Click a column header to sort the list by that column.

Pass/Fail status with test score is displayed. No information is displayed in the status columns for users who have not yet started the course.

8.3 Reports about licences

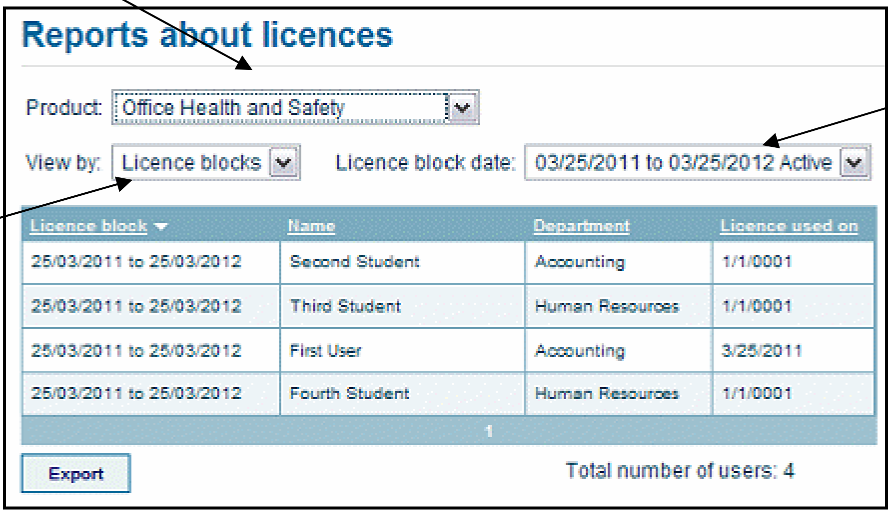
Reports about licences presents information about the licence block(s) for each product that has been assigned to a user.

Click the **Reports about licences** tab to view module information.



When you first access the report, no product is selected. Select a product to view licence information about that product.

When you select a product, the licence information appears for that product, along with two new viewing options.



View by licence blocks or select **View by: > Users** to show licences allocated to specific users.

The default view for this report shows licences allocated to users from a single licence block. If your company has purchased licences in multiple blocks, use this drop-down to select another.

You may also select **View by: > Users** to view users by first letter of surname, or to search for specific users by surname.

Selecting **View by: > Users** opens two new fields for filtering the report.

Select a letter from the **Surname** drop-down to view all users whose surnames begin with that letter.

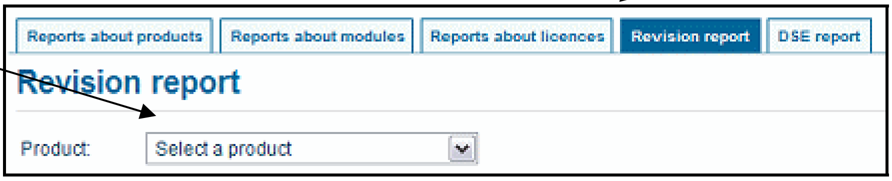
Enter a surname and click **Search** to view only users with that surname.

8.4 Revision report

Each module completed by a student user ends with a “Test Your Knowledge” section of 20 questions. When a user receives less than a perfect score on a test, the user is prompted to review the module(s) in question. That module is then displayed by the Management System as a revision item on the **Revision report**.

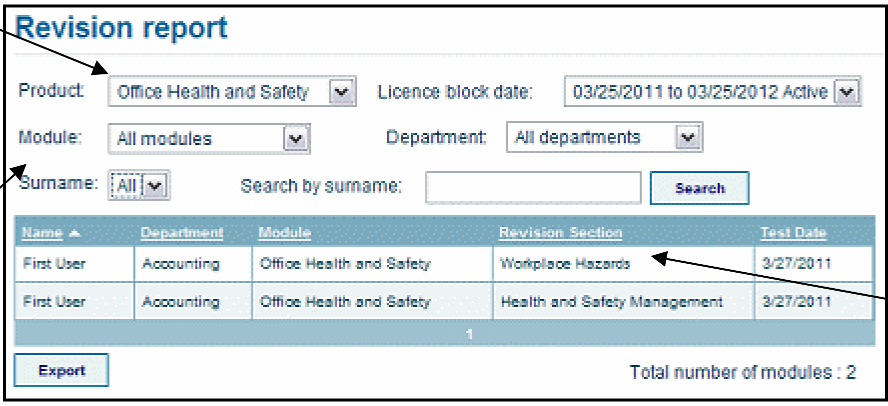
Click the **Revision report** tab to view revision information.

When you first access the report, no product is selected. Select a product to open more filter criteria and view revision items.



With a **Product** selected, several more drop-down filters and the revision information appear.

Use the drop-down filters to narrow or expand the scope of the information you would like to view.



You can filter information in this report by **Licence block**, **Module**, **Department** or **Surname**.

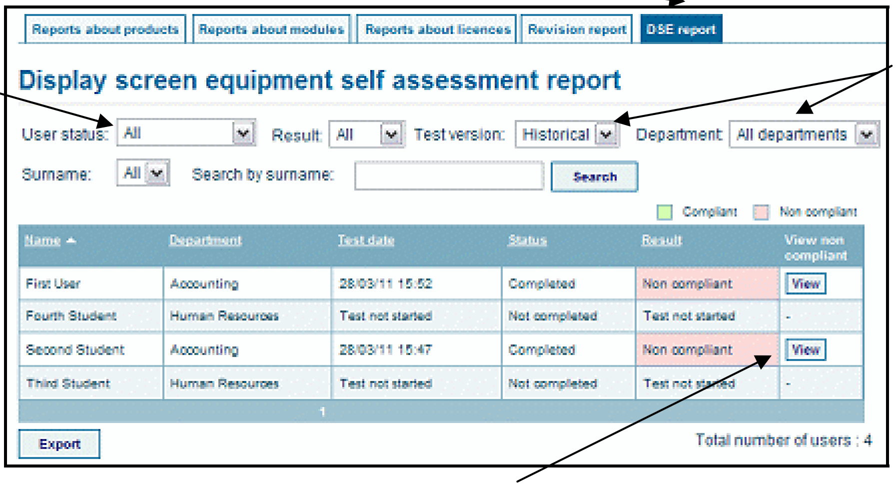
The modules requiring revision appear in this column.

8.5 DSE report

The **DSE report** shows the status of the Display Screen Equipment Self Assessment for all students to which that module has been assigned. The **DSE report** offers a convenient way to review non-compliant elements in a user's display screen setup.

Click the **DSE report** tab to view assessment information.

When you first access the report, all who have been issued a licence to the self assessment are displayed.



Use drop-downs to filter the report list by **Result**, **Test version** (recent or historical), **Department** or user **Surname**.

Click the **View** button to see a list of the non-compliant elements of the setup of users who are not fully compliant.

Use the **Print** or **Export** buttons to generate a copy of the assessment issues for your records.

The **Comments** field contains any written comments on DSE issues supplied by the student user during his or her self-assessment.

8.6 Exporting report information

Any of the reports in the Croner eLearning Management System can be exported in Microsoft Excel .xls spreadsheet format. To export a report, click the **Export** button.

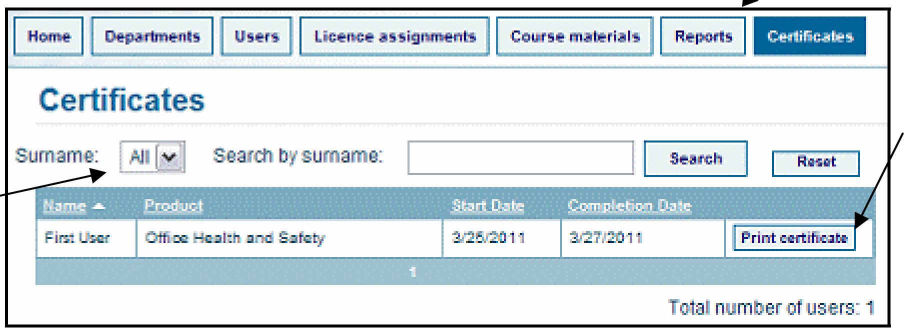
Your browser will prompt you to open or save the file to your computer.

9. Certificates

The **Certificates** page provides a list of employees who have passed an eLearning training course.

To begin viewing certificates:

Click the **Certificates** button on the navigation menu to open the **Certificates** page.



You can filter the list by **Surname** by selecting a letter of the alphabet from the **Surname** drop-down.

Click **Print certificate** to open a .pdf version of the certificate to save or print.